Reviewer Step-by-Step Guide

To access your assigned cases:

1. Log in to Interfolio.com. Click Log In followed by clicking Sign in With Partner Institution.

2. Type in Northridge, select the campus name, click Sign In, and enter your CSUN portal credentials.
3. Select your Institutional Account (CSUN) if needed.

4. Select Cases under Review, Promotion & Tenure on the left-hand navigation bar.
   *Please note: Sabbatical Cases will still be found under the Review, Promotion & Tenure tab due to Interfolio’s design.

5. You will see a list of cases that are available to you. Click the name of the Candidate to view case materials (Candidate’s Packet includes the ePIF and ePAF materials).
6. The Candidate's Case automatically defaults to the **Case Materials** tab. You may read Sabbatical/DIP leave materials submitted by the candidate and committee members by clicking **Read Case**.
To make Annotations in the materials:

1. You can make notes on materials as you review the file. The **Annotations** are private and can only be viewed by you.

2. Click the **View** icon to toggle on or off the display of annotations.

3. Click the **Note** icon to add an annotation on the currently displayed document.
4. After clicking the Note icon, select the type of annotation you want to create:
   - Make no selection to add a simple **Sticky** note to the document
   - **Point** adds a note with an arrow pointing to a particular point in the document
   - **Area** adds a note about a selected area
   - **Text** adds a note about highlighted
**Turn On/Off Candidate Editing of Packet Materials:**

1. Navigate to the case by clicking the candidate’s name in your list of cases (refer to steps 4 and 5 under *To access your assigned cases above*).

2. Click the **Lock** buttons to lock/unlock each of the candidate uploaded materials to enable or disable editing by candidate. Sections of the candidate's packet containing materials can be independently locked or unlocked to allow editing on a section by section basis. Be sure to lock the candidates packet materials by the department review date.
Uploading the Personnel Decision Letter, Candidate Rebuttal, and Committee Recommendation:

Please Note: After the 7 days of emailing the Personnel Decision letter to the candidate, you are required to upload the final Personnel Decision Letter.

1. First, if a rebuttal was provided by the candidate, upload the letter to your appropriate reviewing agency Section located in Case Materials tab (case default page) in the Internal Sections by clicking Add File.

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

2. Next, click the Case Details tab to upload the final Personnel Decision Letter after 7 days from emailing the letter to the candidate.

Under Required Items: click Add to upload the Personnel Committee Decision Letter (and the Candidate’s Rebuttal if provided as one document).
3. **Next**, click **Fill Out Form** to enter your sabbatical/DIP leave recommendation. For Sabbatical applications, both the DPC and CPC will have to fill out a form. For DIP applications, only the DPC will have to fill out a form (See Fill Out Form instructions below).

4. **Please note:** When uploading the letter, be sure to select your review section as there are several options.
The **FILL OUT FORM** for Dept. Chairs, Committee Chairs, and Deans

**DEPARTMENT CHAIR FORM**

The Department Chair will be indicating if the leave is advisable or not. Should you decide that the leave is inadvisable, please use the box below to provide an explanation. To finalize, click **Submit form**.

**DEPARTMENT PERSONNEL COMMITTEE (DPC) FORM**

The Department Personnel Committee Chair will be selecting one of the options below. To finalize, click **Submit Form**.
Below are the recommendation options for the College Personnel Committee chair. You will be selecting only one choice keeping in mind the number of sabbaticals allocated to your college. To finalize, click Submit Form.

**Please note: If you select Meritorious and recommended, please list the years of sabbatical credit in the box below.**

### DEAN FORM
The Dean will be indicating if the leave is advisable or not. Should you decide that the leave is inadvisable, please use the box below to provide an explanation. To finalize, click Submit form.
Moving the Case Forward to the next Reviewing Agency

1. To move the case forward to the next level of review, scroll to the top of the case page and click on Send Case and select the reviewing agency.

2. A template email will then pop up for you to write a message to the next reviewing agency. Type in a subject, email message and lastly click Continue. The case will move to the next level for review. (See next page).